

**A PROPOSAL TO PROVIDE  
MEETING MANAGEMENT SERVICES  
FOR THE  
STUDENT FINACIAL ASSISTANCES ORGINAZATION**

By

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**ConferenceDirect**

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## INTRODUCTION

Thank you very much for providing ConferenceDirect with this opportunity to propose meeting management services for the Student Financial Assistance Organization (SFAO)

### ***Who is ConferenceDirect?***

ConferenceDirect is a full service meeting Management Company equipped to handle all aspects of your conference or meeting.

### ***What service does ConferenceDirect provide?***

As a full service meeting management company ConferenceDirect can assist you with; Site Selection, Pre-Conference Management, Exhibit Management, Housing & Registration, Speaker Bureau, Production, Destination Management, and On-site Logistics.

### ***History & Background***

ConferenceDirect was originally founded as a site search company for associations and corporations. We are characterized as an independent, non brand-biased, professional service organization and have quickly become one of the leading site search companies in the country.

As part of our site search services, we will discuss destination and facility suggestions, goals and objectives, projected audience profiles, destination and site criteria and budget. We will review your request for proposal ("RFP") and criteria for selection and, if appropriate, make suggestions for modification based on your needs and our knowledge of the hospitality industry. We will distribute the RFP to appropriate facilities and collect responses on your behalf. You will be provided with a detailed analysis of availability, pricing and key features for all options. Together we will review this information, discuss any questions you might have on product, pricing, etc., and advise you on the best choices.

Based on your feedback you will receive either more detailed proposals or preliminary contracts to review. At this point, you may want or need to do site inspections, which we would be available to do on your behalf should your schedule not allow. Once a site has been selected, we will draft and negotiate the contract. If you use your own contract, we will review and make recommendations, if appropriate, and submit the contract to the selected site. You will approve all language and terms of any agreement prior to submission. After a final contract has been agreed to, it is advised that the CEO and/or legal counsel review the contract prior to final signing.

In March of 1999, ConferenceDirect expanded its scope of business adding full service meeting planning. Our customers told us in addition to needing help with site search work; they found it increasingly difficult to manage their day-to-day duties along with all the demands of a meeting or conference. Our Conference Management Staff is fully prepared to assist you with: marketing your event, conference management, registration management, speakers & entertainment, audio-visual needs, exhibit management, on-site coordination, and post meeting reconciliation.

## **Mission Statement**

ConferenceDirect will enhance the business and personal lives of our customers and colleagues by utilizing fundamental trends in the way we do business. Customers will benefit from the professional, cost-efficient and prompt solutions for meeting and conference needs. We believe that a combination of long term personal relationships and technology will provide superior service to our customers while allowing our associates to move in to the business style of the next millennium. We want to impact the lives of others in a positive way

## **ConferenceDirect's Leadership**

### **Brian Stevens President and CEO**

Brian D. Stevens is the co-founder of an all brand national sales organization called ConferenceDirect. ConferenceDirect was founded to assist professional meeting planners determine availability, negotiate rates, handle conference management, and contract space for their conventions and meetings.

Prior to ConferenceDirect, Stevens held the position of Vice President of Sales and Marketing, which began in August 1994, and was responsible for all hotels and sales offices in the United States. Brian previously held the position of Vice President of Sales since September 1988 and over saw Hilton's domestic sales force. From 1988 - 1992 he also managed Hilton's overseas offices. Stevens began his career with Hilton in 1978 as a Sales Executive at the Oakland Hilton.

Brian has been on the Professional Convention Management Association Foundation Board for 13 years, as well as serving on PCMA's Board from 1992-1994. He has been Chairman of the PCMA Affiliate Advisory Committee, and has been a speaker at PCMA conventions.

Brian served on the American Society of Association Executives Foundation Board of Directors for 13 years. He was the first Co-Chair of ASAE's Five-Star Weekend, and also started ASAE's "Club Energy", which is in its' 10<sup>th</sup> year. He also started the Foundations Testimonial Dinner in 1989.

Stevens currently serves on Meeting Professional International's International Board of Directors, and has been involved in raising over \$3,000,000 for ASAE, PCMA, NBTA and MPI Foundations, collectively, through events he has chaired for these organizations on capital campaigns.

In 1997, he received the PCMA "Distinguished Leader" Award. He is currently Chair of the ASAE Foundation, as well as Chair of the ASAE Associate Member Past Director's Committee. He has been an ASAE Associate Fellow since 1991.

### **Joe Dymek, CMP, Executive Vice President Conference Management**

Joe Dymek, CMP, Executive Vice President of Conference Management brings over 15 years of meeting planning experience to his position at ConferenceDirect. Prior to joining ConferenceDirect he was the Corporate Director of Conventions Service for Hilton Hotels Corporation for four years. Among his duties while at Hilton, he was responsible for overseeing the Convention Service Departments for Hilton's managed and owned hotels. He would conduct yearly property reviews and established standard and procedures for Hilton's Conventions Service Department. In addition to these duties he was responsible for

overseeing Hilton's two large customer events each year. Each event would bring in approximately 125 of Hilton's top customers and their spouses, along with 125 of Hilton's sales managers and executives. The events were a combination of educational classes, recreational events/tours and theme parties.

Before joining Hilton Hotels Mr. Dymek worked for Hyatt Hotels as a Director of Convention Service for over 10 years. During that time period he worked at the Hyatt Regency Minneapolis, Hyatt Regency DFW Airport and the Hyatt Regency Chicago. As the Director of Convention Service he was responsible for overseeing the execution of all meetings at each of these properties. During this time period Mr. Dymek personally handled over 300 meetings, ranging from new product launches, to educational conferences and annual conventions for both Corporations and Associations.

Mr. Dymek has been asked to speak on a variety of Convention Service topics at both PCMA's and ACOM's annual conventions

## **PRE-PLANNING**

ConferenceDirect believes that with our experienced staff and resources we are in an excellent position to help SFAO manage all aspects of its conferences.

ConferenceDirect see its role as:

- Assisting SFAO in the management of their conferences. By efficiently managing their conferences, ConferenceDirect will free up time for the SFAO staff to concentrate on their core responsibilities and duties.
- Handling all meeting logistic with the hotel and selected vendors, closely monitoring the event budget ensuring that all vendors stay within budget.
- Ensuring all meetings and conferences are executed in a timely manner once on-site.
- Producing a post convention report following each event for SFAO.

ConferenceDirect will assign a dedicated Meeting Manager who will be responsible for working with SFAO. The ConferenceDirect Meeting Manager will ultimately be responsible for making sure everything is executed in a timely manner for each event. They will coordinate as much or as little of the planning and execution of the event as you desire. The Meeting Manager will be the main contact between SFAO and the hotel during the pre-planning portions of the meeting.

## **PRE-EVENT PLANNING**

It is our understanding that ConferenceDirect would be ultimately responsible for the event making sure that all aspects of the preplanning stage of the meeting are handled in an efficient manner. As such, we see the role of the Meeting Manager during the pre-planning stage of the event to include the following, but not limited to these items:

## **Site Planning**

ConferenceDirect, in conjunction with SFAO, will secure selected three and four star hotels in each of the given cities by SFAO where they need to meet.

ConferenceDirect will

- Develop a standardize lead sheet for the SFAO Conferences, distributing them to the appropriate hotel in each of the selected cities
- Compile the responses to the Lead Sheets into a detailed report for SFAO
- Negotiate the Event contract for SFAO insuring that all major needs are met by the selected hotel

## **Registration Services**

Armed with experienced and dedicated registration specialists, state of the art software designed for event information management, and systems and procedures designed for success, ConferenceDirect will become a dedicated and integral part of SFAO success.

## **Registration Process**

The registration process for SFAO will include the following:

### **Pre-Registration**

All participants that wish to attend will be able to register for the conferences via the web page, if necessary attendees will also be able to register via fax.

### **Conference Confirmation**

Each attendee will receive either:

1. An email confirmation when registered over the internet
2. Emailed confirmations will be sent with hours of the attendee registering for the course
3. A fax or mailed copy if registered other than internet
4. Send email or fax reminders about the conference

Each confirmation will restate all registration data for the attendee. At this time if conference credentials or any other materials are to be sent, they will be combined with the confirmation letters and mailed until an agreed upon cut off date. Following the cut off date, all confirmations will be faxed or emailed or picked up on site.

## **Database Development**

All registrations will be entered into a custom designed database that SFAO will receive in one of several formats. This database may then be used for mailings, membership or marketing purposes. Our database developers will work closely to determine what information needs to be gathered prior to the implementation of the registration process. All our databases are customized for each event.

As a by-product of this database application, Avery Labels, name badges and a variety of other outputs will be available.

**Financials/Budgeting**

- Monitor the program budget that has been developed by SFAO through out the pre-planning phase of the conferences
- If requested assist in the development of the budget by securing pricing information from the hotel, vendors, etc.

**Food & Beverage**

- Select AM & PM Coffee Break's for each event

**Audio Visual**

- ConferenceDirect will order all audio visual equipment necessary for the meeting
- Will negotiate the best possible audio visual prices for SFAO

**Sleeping Rooms**

- Monitor sleeping room pick-up, if necessary
- Coordinate VIP and staff housing arrangements as needed

**ON-SITE COORDINATION**

If ConferenceDirect's assistance is requested on site we will supply one Meeting Manager on an as needed basis to coordinate all of SFAO's needs. Basic responsibilities of the meeting managers will be to work with the hotel during the event. ConferenceDirect will ensure that every event is executed in an accurate and timely manner. The meeting managers will arrive, the evening prior to the start of the event. On-site services will include but will not be limited to:

- Managing the hotel to ensure that everything is executed in a timely manner
- Assist attendees with any problems or last minute changes they may have
- Management of the program budget on site
- Assist with on-site registration process
- Ensure that all materials have arrived on site
- Staff a central registration desk through out the event to assist all attendees
- Assist in the assembly of any event materials
- Review all food & beverage events before they start to insure they are ready
- Audit the master account on a daily basis

**POST EVENT**

After the each event where ConferenceDirect is on site ConferenceDirect will audit the master bill and ensure its accuracy before presenting the bill to SFAO for payment. A preliminary bill will be presented to SFAO no later than 14 days after receiving the bill from the hotel. The preliminary bill will highlight any billing discrepancies that may not have been authorized by SFAO or ConferenceDirect meeting manager prior to the event. Once all billing discrepancies have been corrected a final bill will be presented to SFAO for payment.

In addition ConferenceDirect will:

- Send thank you letters to speakers and sponsors
- Give SFAO a detailed breakdown of all expenses and revenues
- Participate in meetings to review the conference

## **FEES**

ConferenceDirect will provide all meeting and logistical services outlined above for SFAO for a Fee of \$250.00 per event.

In addition to this cost there will be a charge of \$500.00 per day for each ConferenceDirect Staff member while on site at an event.

SFAO will be responsible for all unusual meeting related expenses during the Pre-planning portion of the event that could include postage, telephone, name badges, production cost of materials, etc, depending on SFAO's final event needs. In addition SFAO will cover the costs of the meeting managers expenses while on-site during the conferences. Expenses include the following but may not be limited to airfare, hotel accommodations, transfers between home and the airport and airport and the hotel, a meals, phone calls and laundry.

ConferenceDirect will provide Housing & Registration for the SFAO for a cost of \$2,500.00 for web page design and any necessary data transfer. In addition there would be an additional charge of \$100.00 per month for web page updates and modifications due to the addition of new conferences. Finally ConferenceDirect will charge \$10.00 per attendee plus the cost of postage, telephone, faxing name badges and holders.

## **SUMMARY**

In summary, by selecting ConferenceDirect to assist SFAO with it's conferences, you will benefit by working with a professional meeting management company. All ConferenceDirect Meeting Managers have years of meeting planning experience either in the hotel industry or as a meeting planner.

This experience will prove to be invaluable in managing the annual conference. In the pre-planning phase it will mean having a Meeting Manager who will confidently handle all of the pre-planning items you assign them. This in turn will allow the SFAO staff to focus on their core responsibilities and duties.

On-site you will have an experienced staff that will not only know how to handle problems as they arise, but can foresee potential problems, and prevent them before they happen.

Finally, ConferenceDirect will give SFAO the flexibility of having the proper level of staffing for all conferences without having to increase the number of employees as the meetings grow in size.

Once again ConferenceDirect would like to thank SFAO very much for the opportunity to bid on meeting management service for their conference. We look forward to discussing this proposal in detail with you in the near future. Should you have any questions or need additional information please feel free to contact Joe Dymek 773-529-0427.

The contents of this proposal are intended for SFAO, and are not to be shared with other meeting planning companies or organizations.